

ITWS Access Approval Instructions

Overview

With the implementation of the California Outcomes Measurement System (CalOMS) all counties, direct providers, and some of the vendors will be submitting CalOMS treatment data to California Department of Alcohol and Drug Programs (ADP) through the Department of Mental Health's (DMH) Information Technology Web Service (ITWS) portal. The ITWS portal will also be the way that counties, direct providers, and vendors monitor the data submission and receive data submission status and errors reports, as well as access the various outcome and other reports to be available through the CalOMS system.

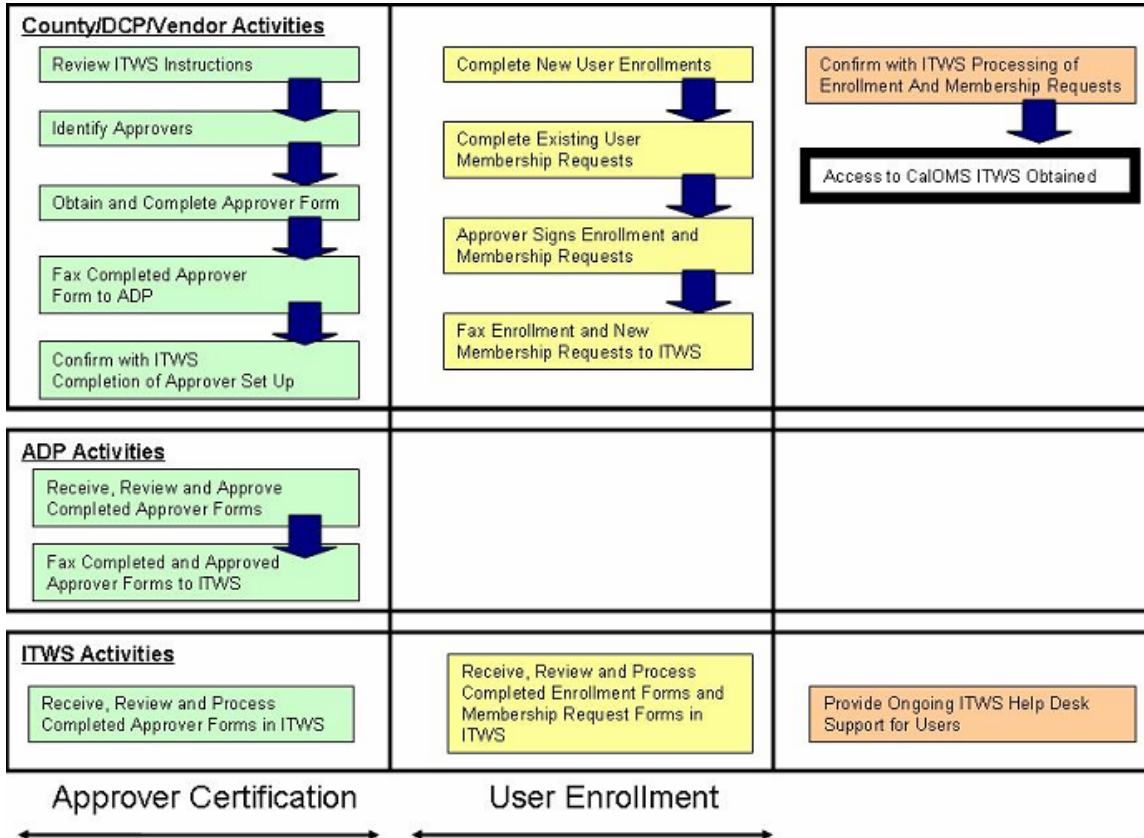
In order to be able to access the ITWS portal to report CalOMS data, all counties and direct providers, as well as those vendors who have the business need to access ITWS, must complete the ITWS access approval process.



IMPORTANT: All counties, direct providers and vendors who have the business need to access ITWS must obtain ITWS access prior to starting Certification Testing of their CalOMS system with ADP.

The ITWS access approval process consists of the following steps:

- **Complete Approver Certification** – each county, direct provider and vendor must select two CalOMS “approvers.”
- **Complete User Enrollment** – each user must complete the ITWS user enrolment process to gain access to CalOMS interface in ITWS system.



Picture 1 – ITWS Approval Process Overview

ATTENTION EXISTING ITWS APPROVERS/USERS: Some counties, direct providers and vendors are already using the ITWS portal for other systems (e.g., Drug Medi-Cal, Billing, etc) and have approvers and users established in ITWS for those systems. DMH and ADP require that new CalOMS approver certifications be completed for all counties, direct providers, and vendors in order to gain access to the CalOMS interface in ITWS. Users that are currently enrolled in ITWS for other systems must follow an abbreviated enrollment process to gain access to CalOMS (see Existing ITWS User Enrollment section later in this document).



IMPORTANT: Each organization is responsible for protecting the confidentiality of individually-identifiable health information and to disclose this information only under proper authorization as required by the Information Practices Act (CA Civil Code 1798-1798.1), the Confidentiality of Alcohol and Drug Abuse Patient Records (42 CFR part 2), and the Health Insurance Portability and Accountability Act (HIPAA; 45 CFR Parts 160 and 164).

See the attached “Confidentiality Statement to Users of the Information Technology Web Services (ITWS)” for more information.

Approver Certification Instructions

Approvers are responsible for approving user enrollment requests by county and direct provider/vendor staff for access to the ITWS portal for the submission and retrieval of CalOMS data and reports.

To ensure the confidentiality of county/direct provider CalOMS data, ADP requires that the county alcohol and drug program administrator or direct provider/vendor executive officer designate a primary and a secondary CalOMS “approver” within their organizations.

Approver Certification Steps

County/Direct Provider/Vendor Responsibility:

1. Identify the approvers within your organization.
2. Download the **County/Direct Provider Approver Certification (Form ADP 100177) or Vendor Approver Certification (Form ADP 100178)**. Both forms are available in PDF format from the ITWS site (<https://mhhitws.cahwnet.gov>) as explained below.
3. Complete the County/Direct Provider/Vendor Approver Certification form and fax to ADP using the fax number indicated on the form. Fax the completed form to ADP at (916) 324-3021 (listed on the form) to the attention of “Rick Richardson.”

ADP Responsibility:

1. Review the submitted form for completeness, including signatures of approvers and administrator/executive officer.
2. Approve the submitted County/Direct Provider/Vendor Approver Certification form if determined complete and accurate.
3. Fax the signed and approved form to ITWS help desk support.

ITWS responsibility:

1. ITWS enters the approvers' information into their system.
2. ITWS notifies the approvers of their successful certification via e-mail. Once notified, approvers now have the ability to approve ITWS user enrollments for their organization.

If you experience any difficulty during the approver certification process, please contact the ITWS help desk at (916) 654-3117 or 654-3445 or by e-mail at itws@dmh.ca.gov.

How to Obtain the Approver Certification Forms

The approver forms—County/Direct Provider Approver Certification (Form ADP 100177) and Vendor Approver Certification (Form ADP 100178)—are available for download in PDF format at the ITWS website, <https://mhhitws.cahwnet.gov>.

NOTE: You do not need to log onto the ITWS site to access these forms!

1. Navigate to the ITWS portal main page (<https://mhhitws.cahwnet.gov>).
2. Choose the "Support" menu button at the top of the page.
3. Select "ADP Approver Certification Forms" from the drop-down list.
4. On this next page, click on the "CADDs/CalOMS Forms" bookmark at the top of the page or just scroll down until you get to the "CADDs/CalOMS" section.
5. Click on the link to the required form (County/Direct Provider Approver Certification (Form ADP 100177) or Vendor Approver Certification (Form ADP 100178) located on the left-hand side of the page.

How to Complete the Approver Certification Forms

County/Direct Provider Approver Certification (Form ADP 100177)

The form is designed to designate approvers for a county or a direct provider and identify the county or direct provider's vendor, if applicable. The form must be filled out with all the approver information, signed by each of the approvers and approved/signed by the county alcohol and drug program administrator or direct provider executive officer.

Please use the following guidelines when completing the form:

1. Print clearly using large, block capital letters using black ink. If possible, type in the information.
2. Fill in "**County Name**" and "**County Number**" only if you are filling this form for a **county** (i.e. San Luis Obispo). Do not fill in any of the "direct provider" fields!
3. Fill in "**Direct Provider Name**" and "**Direct Provider Number**" only if you are filling this form for a **direct provider** (i.e. "Pharmatox, Inc."). Do not fill in any of the "county" fields!
4. If your organization is using a system created by the third party (Vendor), and you wish them to be able to access the ITWS and the CalOMS system on your behalf, you must fill in "Appointed Vendor" box. Your vendor will not be able to have their approvers certified if this box is not completed. Under "Vendor Contact Name," identify the Vendor executive officer who will be signing/approving the vendor approver certification form. If you're unsure who this is, ask your vendor.
5. Check "California Outcomes Measurement System (CalOMS) box under "Systems."
6. Print the name of the administrator/executive officer certifying the form on the county or direct provider side next to their signature.

Fax the completed form to ADP at (916) 324-3021 (listed on the form) to the attention of "Rick Richardson."

Vendor Approver Certification (Form ADP 100178)

This form is designed for the vendors working for counties and direct providers to designate approvers for their own organization. This permits the vendor to manage its own employees' access without having to obtain permission from the county or direct provider on an individual-by-individual basis.

The form must be filled out with all the vendor approver information, signed by each of the approvers and approved/signed by the vendor's executive officer.

Please use the following guidelines when completing the form:

1. Print clearly using large, block capital letters using black ink. If possible, type in the information.
2. Enter in **all** the counties or direct providers for which you are providing vendor services in the "Vendor for the Following Counties/Direct Providers" box. Indicate county and/or direct provider **name and number**.
3. Print the name of the vendor executive officer certifying the form next to their signature

Fax the completed form to ADP at (916) 324-3021 (listed on the form) to the attention of "Rick Richardson."



IMPORTANT: The County/Direct Provider Approver Certification (Form ADP 100177) **with the "Appointed Vendor" section completed** must be on file with ADP before the Vendor Approver Certification form can be approved and handed over to ITWS for processing.

New ITWS User Enrollment Instructions

Once the county, direct provider, and, if applicable, vendor approvers have been certified, ITWS will notify the approvers via e-mail and confirm the certification. After the approvers have been established and confirmed, appropriate users within these organizations may start their enrollment for individual access to the ITWS portal.



IMPORTANT! If you are already enrolled as an authorized ITWS user for another data system (i.e., you already have an authorized user name and password that enables you to access CADDs or Short-Doyle/Drug Medi-Cal), you need to follow the abbreviated user enrollment process described below under the "Existing ITWS User Enrollment" section.

User Enrollment Process Steps:

County/Direct Provider/Vendor User Responsibility

1. Navigate to ITWS website main page using the following address:
<https://mhhitws.cahwnet.gov/>.
2. Select “Enroll” menu button at the top of the page, and then select “Enroll in ITWS” from the drop-down list.
3. Follow the step-by-step instructions to fill out the requested information (see instructions below).
4. Print and sign the resulting ITWS Enrollment Request form.
5. Have the authorized approver for your organization sign the ITWS Enrollment Request form that you printed.
6. Fax the approved enrollment request form to **ITWS** at (916) 654-3007.

ITWS responsibility:

1. ITWS enters the authorized user into their system.
2. ITWS notifies the user of their successful enrollment by e-mail.

ITWS User Enrollment Step-by-Step Instructions:

The following is a description of the six screens the user will encounter as part of completing the onscreen information during the ITWS enrollment process. Please note that the term “Step” as used below refers to Steps 1–6 in the onscreen ITWS enrollment:

- **Step 1—Description of Enrollment Process**

Provides basic information about ITWS procedures, security, and operation. After reading, select the “Next” button.

- **Step 2—Enter User Information**

Enter the information requested including the User Type that matches you and the Organization name from the drop-down boxes.

If you select **Direct Provider** under User Type, the following field called Organization will not work—ignore it. On the following screen you will be able to identify your organization by selecting your provider number. The Organization drop-down box works fine for **Counties and Vendors**.

If you are a **Vendor** currently working for either a county or direct provider, select “Vendor” in the User Type drop-down box and then select your organization from the Organization drop-down box.

Select a User Name and Password that meets the listed requirements; note that passwords are case sensitive. Make sure to record your user name and password and store in a secure location for future use.

When done, select the “Next” button.

- **Step 3—Select Memberships**

If you are a **County** employee, select the “ADP” tab in the “Systems” window and then select “California Outcomes Measurement System (CalOMS)” from the list of data systems. Leave the check-box called “Check box to get System Information and Messages access only” unchecked.

If you are a **Direct Provider** employee, select “California Outcomes Measurement System (CalOMS)” from the “Systems” list and select your provider number from the “Providers” list. Leave the check-box called “Check box to get System Information and Messages access only” unchecked.

If you are a **Vendor**, under “Organization,” select the County or Direct Provider for whom you are enrolling. Next, select “California Outcomes Measurement System (CalOMS)” from the “System” list. Leave the check-box called “Check box to get System Information and Messages access only” unchecked.

When done, select the “Next” button.

- **Step 4—Approver and Optional Functions**

Under the “System” column, select one or more of the functions listed. If in doubt, check with your CalOMS Tx system administrator for the appropriate functions for your enrollment.

Under the “Approver” column, select one of the two approvers from the drop-down box to who have been certified for your organization. This is the person who will sign/approve your ITWS enrollment request form at the end of this process. If you see the message **No Approving Contact Found** it means your organization has not completed the approver certification process yet and no ITWS user enrollments can proceed until this has been done. Contact your management.

When done, select the “Next” button

- **Step 5—Verify Information and Submit**

Check over the information and verify that it is all correct. Click on the “Edit” buttons to correct any incorrect information. If you selected **Direct Provider** under User Type in Step 2, the field called Organization will be blank—don’t worry about it. We’re working to get this corrected.

When ready, select the “Submit” button at the bottom of the page and your enrollment information is sent electronically to ITWS. The ITWS Enrollment Request Form will now appear on your screen.

- **Step 6—Print and Fax Signed Request**

Print the onscreen enrollment request form, sign it, and have it approved by the “Approver” you selected during the enrollment process. Fax the completed form to ITWS at (916) 654-3007.

The requester will receive e-mail responses from ITWS on the status of their enrollment request. Once they have been notified that their enrollment request has been approved, they are now fully capable of accessing ITWS.

If you experience any difficulty during the enrollment process, please contact the ITWS help desk at (916) 654-3117 or 654-3445 or by e-mail at itws@dmh.ca.gov.

Existing ITWS User Enrollment Instructions

County/direct provider/vendor staff that are currently enrolled as authorized ITWS users for other data systems can request that CalOMS membership to be added to their existing account by completing the following steps.

Requesting Additional Memberships:

County/Direct Provider/Vendor User Responsibility

1. Log onto the ITWS website at <https://mhhitws.cahwnet.gov/> using your existing ITWS user name and password.
2. Click on the "Utilities" menu button at the top of the page.
3. Select "Request Additional Memberships" from the drop-down list and then follow the instructions on the screen.
4. Select CalOMS System from the list of "Available Memberships" and click on "Verify Additional Membership Request" button.
5. Select your approver and click "Continue."
6. Print and sign resulting form.
7. Have the additional membership request form signed by your approver.
8. Fax the signed and authorized form to **ITWS** at (916) 654-3007.

ITWS responsibility:

1. ITWS will process the request and add CalOMS to the existing user account
2. ITWS will notify the user once CalOMS membership has been added by e-mail.

Canceling ITWS User Access

As indicated at the start of this document, each organization is responsible for protecting the confidentiality of individually-identifiable health information and to disclose this information only under proper authorization as required by the Information Practices Act (CA Civil Code 1798-1798.1), the Confidentiality of Alcohol and Drug Abuse Patient Records (42 CFR part 2), and the Health Insurance Portability and Accountability Act (HIPAA; 45 CFR Parts 160 and 164. This includes managing their staff access to ADP data systems via the ITWS portal and cancellation of that access once it is no longer appropriate.

Once an enrolled user is no longer authorized to access the ITWS portal, the county, direct provider, or, if applicable, vendor must complete the County/Direct Provider/Vendor User Cancellation (Form ADP 100180), which is available for download in PDF format at the ITWS website, <https://mhhitws.cahwnet.gov>.

NOTE: You do not need to log onto the ITWS site to access these forms!

1. Navigate to the ITWS portal main page (<https://mhhitws.cahwnet.gov>).
2. Choose the "Support" menu button at the top of the page.
3. Select "ADP Approver Certification Forms" from the drop-down list.
4. On this next page, click on the "CADDs/CalOMS Forms" bookmark at the top of the page or just scroll down until you get to the "CADDs/CalOMS" section.
5. Click on the link to the required form (County/Direct Provider/Vendor User Cancellation (Form ADP 100180)) located on the left-hand side of the page.

The form must be signed by the county alcohol and drug program administrator or direct provider/vendor executive officer. Fax the completed form to ADP at (916) 324-3021 (listed on the form) to the attention of "Rick Richardson."

As a reminder, between November 2005 and March 2006, ADP will be conducting certification testing on the counties' and direct providers' CalOMS systems. Once the certification testing has been successfully completed, it is conceivable that some of the users that were enrolled and approved for ITWS access during testing may no longer need this access once these systems proceed into full production mode. Also, counties and direct providers may also need to add additional enrolled users as they proceed into the production mode. It is important that ITWS user access be continually adjusted to reflect an entity's current access needs.

For More Information

If you have questions about the ITWS access approval process, please contact ADP by calling (916) 327-4556 or by e-mail CalOMSHelp@adp.state.ca.us.

For users new to the ITWS, there are a series of PowerPoint slide presentations available that walk new users through the basic information about ITWS. This resource may be accessed on the ITWS website—<https://mhitws.cahwnet.gov/>—by selecting the “Support” menu button at the top of the page and then selecting “Virtual Tour” from the drop-down list.

Q and A Section:

1. **Q: How do I know that the approvers for my organizations have been processed and certified in ITWS?**

A: Each new approver will receive an e-mail notifying them that their approver status has been entered into the ITWS system and is active.

Note: Currently, ITWS does not generate automated email notifications for the CalOMS approvers already entered into ITWS for other systems. ITWS help desk is working on introducing this functionality to the approval process.

If you have questions regarding the status of your CalOMS approver certification, please contact the ITWS help desk at (916) 654-3117 or 654-3445 or by e-mail at itws@dmh.ca.gov.

2. **Q: Will the same user ID and password that I obtain during the enrollment process work for both certification testing and real CalOMS data submission?**

A: Yes. The approver certification and user enrollment processes you complete will work for both certification test and production (live data) file submission. Once you're an approver or user, you are able to access the authorized CalOMS system in both the certification testing and production (live) environments.

Between November 2005 and March 2006, ADP will be conducting certification testing on the counties' and direct providers' CalOMS systems. Once the certification testing has been successfully completed, it is conceivable that some of the users that were enrolled and approved for ITWS access during certification testing may no longer need ITWS access once the certified systems proceed into full production mode. Also, counties and direct providers may also need to add additional enrolled users as they proceed into the production mode. It is important that ITWS user access be continually adjusted to reflect an entity's current access needs.

3. **Q: How do I determine if my enrollment request was processed?**

A: Each new user requesting enrollment will receive an e-mail notifying them when they have been successfully enrolled into the ITWS system. Each existing ITWS user requesting additional CalOMS membership will receive an email notification stating that their request has been successfully processed and CalOMS access has been added to their existing account.

4. **Q: How do I make sure that our Vendor has access to ITWS?**
A: Make sure to complete the "Appointed Vendor" section of the County/Direct Provider Approver Certification form (as described above), and ensure that your vendor has also completed their approver form and appropriately identified the counties/direct providers for whom they are working.
5. **Q: When I add CalOMS membership to my existing account, will I be using the same user ID and password to log into CalOMS interface on ITWS?**
A: Yes. The system enables existing enrolled users to add CalOMS system access rights while maintaining their single, existing user name and password.
6. **Q: If approvers for my organization want to also submit CalOMS files via ITWS interface, do they need to enroll or will they be enrolled automatically once approver certification is complete?**
A: Approvers will not be enrolled automatically at the time when their approval is processed. Approvers need to complete a separate ITWS user enrollment for themselves if they are to access the system for submitting CalOMS data files or accessing reports. Approvers can sign their own enrollment or membership request forms.
7. **Q: I lost my enrollment form, can I reprint it?**
A: Yes. Before you login at the ITWS website, you will see the "Enrollment" item in the top menu bar. It will have the menu options to "Check you enrollment Status" and to "Print the enrollment form."
8. **Q: I lost my additional membership request form, can I reprint it?**
A: Yes. Go to the ITWS website and login using your existing user name and password. Under the Utilities menu button select "Request Additional Memberships," and there is a button you can select called "Re-Generate Pending memberships request."
9. **Q: I have faxed my enrollment form to ITWS 2 days ago and have not heard anything, how can I check the status of my enrollment?**
A: If you have questions regarding the status of your user enrollment, please contact the ITWS help desk at (916) 654-3117 or 654-4556 or by e-mail at itws@dmh.ca.gov.
10. **Q: How long does it take to obtain the ITWS access from approver certification to user enrollment?**
A: Once all the necessary information has been provided and the forms are complete and have been approved, the approver certification and user enrollment process should take 2-3 days to complete. Periodic workload variations at ADP and ITWS can affect this approximation. Please plan accordingly and complete the needed ITWS access authorization process as early as possible.